
TRAVEL MANAGER APPROVER'S GUIDE

REVIEW/APPROVE AUTHORIZATIONS

REVIEW/APPROVE AUTHORIZATION

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III. REVIEW/APPROVE AN AUTHORIZATION

All documents for employees whose documents are routed for review or approval will be displayed in the Review Documents area. The document names include the traveler's organization, the date of departure, and the traveler's destination (city and or state). Each travel document has a Travel Authorization (TA) Number. The number has a format of Center ID (10 for Headquarters) plus the Organizational Code (M, S or U for example), followed by a two-digit year indicator and a sequential number. Example: 10-S0330017.

* All HQ travel documents will have a Travel Authorization number.

A. ACCESS THE AUTHORIZATION FOR REVIEW/APPROVAL

Routinely, the Approver will receive an e-mail notification that a document needs attention in the Travel Manager system. The e-mail will contain the traveler's name and the document name. An Approver may request that the e-mail be rerouted or eliminated altogether.

1. Click the **Review Document** link from the Document toolbar, on the left side of the main TM page. The Review document will be displayed with a list of documents to be reviewed.



NOTE

Review Document link must be used in order that the proper signature stamp is defaulted.

- The type of document to be reviewed can be specified by indicating a selection authorization, and voucher, and local voucher in the Document Type. Only documents of that type will be displayed for review. “All” is the default Document Type.

Review Document



Quick Tip

These are documents awaiting your action. Select your search criteria then select the document you want to review.

Enter Search Criteria

Document
Type

Search Results

Click on an entry to select it


Type	Document Name	Dep Date	Traveler	# Days	Retain	In Use
Authorization	51-970 4-8Miami	04/08/02	Eight, Student			
Authorization	51-100 3-31 MSFC	03/31/02	One, Student			
Authorization	51-156 3-25Seatl	03/25/02	Fifteen, Student			
Authorization	51-100 03-03MSFC	03/03/01	Eight, Student			


- If an (*) appears in the IN USE column, the document is either in use by another user or the document is in “Edit Locked” mode and will need to be reset. When a document is “Edit Locked”, it can only be opened in a “view only” mode and cannot be signed for approval.

* Refer to Section, Removing Edit Locks, to review “Edit Locked” document procedures required to reset a document.


NOTE

All documents are listed in order by departure date. The departure dates are displayed in reverse chronological order.



- Click the **Open Document** icon  next to the Document Type to open the document to review/approve.
 - If an adjustment has been made to the document, the Open Document Version page seen below will be displayed. The most current version of the document is always denoted with (**).
 - If no adjustments were made on the document, the Open Document Signature page shown in 5 will appear.

5. Click the **Open Document** icon  in front of the most recent version indicated by the ** in the Document Type field.

Open Document Version for 51-100 03-03MSFC

**Alert**
Adjustments have been made to this document.
Note that only the current version, marked by **, may be further adjusted or routed.

For this Document you can:
Cancel Opening Document


Document Version List					Click on an entry to select it
Document Type	Level	Date	Time	Adjustor	
 ADJUSTMENT **	2	12/04/01	1:46PM	TravelOffice Reviewer	
 ORIGINAL	1	12/04/01	9:05AM	Brian Miller	

The Open Document Signature page will be displayed for the selected document

Help

Document Preparation

Open Document Signature

**Quick Tip**
The Signature PIN is case sensitive!

Signature for Adjustment

For this Document you can:
Sign to Review Document
Get Document as View-Only
Cancel Opening Document

6. Click the Get Document as View Only button, to view without adjusting the document. (A signature is not required for “view only” mode.) In this mode, documents can be reviewed and/or printed. The Cancel Opening Document button will exit the Signature Adjustment page and return to the main Travel Manager page.
7. If you are ready to sign a document or anticipate making adjustments to the document, enter your Signature PIN.
8. Click Sign to Review Document to access the document. The Document Summary page is displayed for the selected document.
 - Enter the Signature Pin in the Signature for Adjustment field.
 - Click the Sign to Review Document button. The document Summary page will be displayed.

Setup Reports Logout Help Document Preparation

User: Approver One
Traveler: Student One
Authorization: 51-100 2-4 MSFC

Document Summary

- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting Code
- Totals
- Comments
- Document Status
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

Document Summary for Adjustment to Authorization 51-100 2-4 MSFC

Quick Tip
For specific information, click on a Details link. You can sign and stamp your document from the Document Status section.

Travel Authorization Number: TG-475-0-02
[Traveler Details](#) 000-TR-0001, Student One

Purpose Description <No Purpose Description Entered>
[Itinerary Details](#) HUNTSVILLE,AL 02/04/02 - 02/08/02
[Ticketed Trans](#) \$350.00
[Details](#)

Expense Details

Expense Summary

Edit	Delete	Date	Expense	Amount
		02/04/2002	Rental Car	125.00
		02/04/2002	Taxi	12.00
		02/04/2002	Taxi	12.00
				Total: 149.00

Lodging/M&IE Details \$451.00
[Other Authorizations](#) <No Other Authorizations Details>
[Details](#)

Accounting Code
[Details](#)

Accounting Code Summary

Label	Amount
51-1 298-03-95A	125.00
51-2 010-01-03A	825.00
Total: 950.00	

Totals Details

Totals Summary

Disbursement Type	Amount
Estimated Cost	950.00
Advance Requested	0.00

[Enter Comments](#) This is a reminder that your travel voucher is due within 5 days after the completion of your trip. Trip is being funded by another Agency. Reimbursable Account code used.

Document Status Enter Status/PIN to stamp this document

☐ Stamp Without Adj

Document Status: ADJUSTED Awaiting: Approver One **Stamp and Route**

Status To Apply	Signature PIN	Remarks
MGT APPROVED		

B. APPROVE AN AUTHORIZATION WITHOUT ADJUSTMENTS

This section explains the process for signing documents that require no adjustments. If the document requires modification or need to be returned to the initiator for proper adjustment, refer to section III, C.

- Once you have entered your signature PIN and clicked Sign to Review Document, the Document Summary page displays the summarized information on the authorization. Detailed data can be viewed by selecting any one of the links on the left side of the display. To return to this page after viewing the detail pages, click on the **Document Summary** link located on the Document Toolbar.

- Click on the **Pre-Audit** link from the Document Toolbar. Pre-Audits are used to give an indication of what is in the document. If any audit fails, the word FAIL will be in the Status column. A comment describing the failure will appear in the Comments column. A FAIL is noted only to draw attention to a particular area of the document that a reviewer/approver may wish to examine more closely since the preparer has entered additional information in this category. A PASS is an unrelated document item meaning that no relevant information has been entered in this document for this category. Click the Close button to exit the Pre-Audit page. *(For a description of Pre-Audits, refer to the Appendix).*

Pre-Audit Results for 51-100 2-4 MSFC

Quick Tip
Click the Magnifying Glass icon to view detail comments for each audit process.

Document Name: 51-100 2-4 MSFC
Type: Authorization
Traveler: One, Student
Status: FAIL

For this Document you can:

Justify Pre-Audit Results
Close Pre-Audit Results

Pre-Audit Results		
Audit Process	Status	Comments
ACTUALS EXIST	PASS	
APPROVAL BY TRAVELER	PASS	
APPROVE BY TRAVELER1	PASS	
COMMENTS	FAIL	CHECK COMMENTS ON TRIP 1 This is a reminder to review the comments contained in this document.
CONFERENCE ALLOWANCE	PASS	
COST LESS COM. CARR	PASS	
DAILY EXPENSE THRESH	PASS	
EXP CATEGORY USED	PASS	
EXP CATEGORY USED1	PASS	
EXP CATEGORY USED2	PASS	
EXPENSE CATEGORIES	PASS	
FOREIGN TRAVEL	PASS	
LAUNDRY/DRY CLEANING	PASS	
LEAVE EXISTS	PASS	
MEALS AVAILABLE	PASS	
OTHER AUTH USED	PASS	
OTHER AUTH USED2	PASS	
OTHER AUTH USED3	PASS	
OTHER AUTHORIZATIONS	PASS	
OTHER EXPENSES	PASS	
OVERRIDE	PASS	
PERDIEM RATES	PASS	
PERSONAL INFO - KEY	PASS	
TRAVEL MODES	PASS	
TRIP DURATION	PASS	
TRIP DURATION1	PASS	
TRIP PURPOSES	PASS	
TRIP TYPES	PASS	

- Click on **Document Status** link. The **Status** page is displayed.

User:

Approver One
Traveler:
 Student One
Authorization: 51-100 2-4 MSFC

- Document Summary
- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting Code
- Totals
- Comments
- Document Status**
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

Status for 51-100 2-4 MSFC

Quick Tip
 The Signature PIN is case sensitive!

For this Document

Stamp and **Adjustments**

Back **Continue**

Status to Apply

Signature PIN

Remarks

☐ Stamp Document Without Adjustment

Document Routing		
Name	Status	Level
Approver	MGT APPROVED	1
Approver One	MGT APPROVED	1
Reviewer One	REVIEWED	2
Reviewer Two	REVIEWED	3
Reviewer Three	REVIEWED	4
Reviewer Four	REVIEWED	4
Final Approver	APPROVED	6
TravelOffice Reviewer	CERTIFIED	7
CI Travel	CI TRAVEL	8

- Your default status value will be displayed in the Status to Apply field. You can check the document routing to make sure you are applying the correct stamp. (For a description of Status Stamps refer to the Appendix). If a user has multiple authorizations for which he/she may sign, the pull down menu is used to select the appropriate status for this particular review. For example, Mr. Wye may be both a reviewer for foreign travel for anyone in code Q, but also a Management Approver for personnel in code QAA.
- Check any remarks entered in the Document History on the Status page for prior reviewer's comments.

NOTE

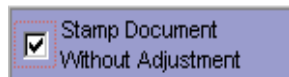
Approvers, Reviewers, the Travel Office, and CI Travel enter their remarks into the Remarks section found in the Document Status screen before it is stamped. Travelers and Preparers enter their comments into the Comment section found in the Document Summary screen.

6. If the document is correct, stamp the document with the correct status stamp.

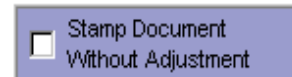
NOTE

When in the Review Documents, the Status to Apply will default to the correct status if status. Only change the status if the document is going to be Returned or Cancelled.

7. If no adjustments have been made to the document, click on the Stamp Doc Without Adjustment box. You will see in the next section C, that if adjustments were made to the document, the box is not checked.



No changes made to document



Changes made to the document

NOTE

If the Stamp Doc Without Adjustment box is not checked when the document is stamped, adjustments are assumed in the Document History, regardless if any have been made

If adjustments have been made to the document and the Stamp Doc Without Adjustment box is checked, all adjustments made will be erased when the document is stamped.

8. Enter the Signature PIN value.
9. Click the Stamp button in the For The Document You Can: box. The Pre-Audit Results page displays all audits that are turned on for an authorization document. Review the Pre-Audits if you have not done so previously. (For a description of each of the Pre-Audits, refer to the Appendix).
10. If an audit fails, the word FAIL will be in the Status column. A comment describing the failure will appear in the Comments column. A Fail is a warning to draw attention to a particular area that the approver/reviewer may want to check. If you want to review the particular part of the document that “failed”, then you can select that section from the menu on the left. Adjustments may be required. For instructions on adjusting authorizations, continue with subsection C on the following page.
11. Click the Continue button. The document is complete and will be automatically routed to the next person on the routing list.

12. If more documents reside in the queue for the Approver, click on the link from the Document Toolbar and repeat the above steps.

 Review Documents

C. APPROVE AN AUTHORIZATION REQUIRING ADJUSTMENTS

This section is designed to show each on-line section of the travel document to which an approver may make adjustments. Within each of the sections, the approver may make adjustments, or return the document to the preparer for adjustments. The document summary page is displayed once the user has entered his/her signature PIN and selected Save To Review Document. (For detailed instructions, see section III, C).

1. The Document Summary page is displayed for the selected document.

[Setup](#)
[Reports](#)
[Logout](#)
[Help](#)

Document Preparation

User:


Approver One
Traveler:

Student One
Authorization: 51-100 2-4 MSFC

Document Summary

- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting Code
- Totals
- Comments
- Document Status
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document







Document Summary for Adjustment to Authorization 51-100 2-4 MSFC


Quick Tip
For specific information, click on a Details link. You can sign and stamp your document from the Document Status section.

Travel Authorization Number TG-475-0-02
[Traveler Details](#) 000-TR-0001 , Student One

Purpose Description <No Purpose Description Entered>
[Itinerary Details](#) HUNTSVILLE,AL 02/04/02 - 02/08/02
[Ticketed Trans](#) \$350.00
[Details](#)
Expense Details

Quick Expense

Edit	Delete	Date	Expense	Amount
		02/04/2002	Rental Car	125.00
		02/04/2002	Taxi	12.00
		02/04/2002	Taxi	12.00
				Total: 149.00

[Lodging/M&IE Details](#) \$451.00
[Other Authorizations](#) <No Other Authorizations Details>
[Details](#)
[Accounting Code](#)
[Details](#)

Label	Amount
51-1 298-03-95A	125.00
51-2 010-01-03A	825.00
Total: 950.00	

[Totals Details](#)

Totals Summary	
Disbursement Type	Amount
Estimated Cost	950.00
Advance Requested	0.00

[Enter Comments](#) This is a reminder that your travel voucher is due within 5 days after the completion of your trip. Trip is being funded by another Agency. Reimbursable Account code used.

Document Status

Enter Status/PIN to stamp this document
☐ Stamp Without Adj
Document Status: ADJUSTED **Awaiting:** Approver One **Stamp and Route**

Status To Apply	Signature PIN	Remarks
MGT APPROVED		

- Click on the **Itinerary** link to view the itinerary details. Review the required fields: Travel Dates, Trip Type, Trip Purpose and Per Diem locations. If any of these fields are missing, make the corrections, or return the document to the preparer. Include your remarks regarding the required modifications. Click the Save Itinerary button before leaving this screen to save any changes you may have made.

Setup Reports Logout Help Document Preparation

User:
Approver One

Traveler:
Student One
Authorization: 51-100 2-4 MSFC

- Document Summary
- Traveler
- Itinerary**
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting Code
- Totals
- Comments
- Document Status
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

Itinerary Information for 51-100 2-4 MSFC

Quick Tip
The Begin Travel and End Travel fields must be completed before a per diem location can be added. Remember to save your itinerary before continuing.

For this Document you can:

Save Itinerary

Back **Continue**

Trip Information

Travel Authorization Number _____

Purpose CONFERENCE

Description _____

Auth Date 12/21/2001

Type SINGLE TRIP

Trip No 1

Departure and Return Information

Begin Travel 02/04/2002

End Travel 02/08/2002

Depart RES: GREENBELT,MD **Depart Selection**

Return RES: GREENBELT,MD **Return Selection**

Trip Duration Multiple days

Comments
This is a reminder that your travel voucher is due within 5 days after the completion of your trip. Trip is being funded by another agency. Reimbursable Account code used.

Preset

Per Diem Locations

☐ Replace ALL lodging and M&IE information on this document. **Add Location**

Edit/Delete	Arrival Date	Location	Departure Date
	02/04/02	HUNTSVILLE,AL	02/08/02

- Click the **Comments** link from the Document Toolbar if to review any comments that may affect the approval of the document. Additional comments can be added if desired.

Comments for 51-100 2-4 MSFC

Quick Tip
Click Apply and preset comments are inserted into the Comments field. Comments can also be typed directly into the comments field. Comments apply to the entire document.

For this Document you can:

Apply Preset Comments

Save Comments

Back **Continue**

Close without Saving Comments

Comments
This is a reminder that your travel voucher is due within 5 days after the completion of your trip. Trip is being funded by another agency. Reimbursable Account code used.

4. Click Close after reviewing comments. The Document Summary page will be displayed.
5. Click on the **Ticketed Trans** link from the Document Toolbar to review travel mode estimates. The Ticket Transportation page is displayed.

Ticketed Transportation for Authorization 51-100 2-4 MSFC

Quick Tip
To enter ticket information, click Add. Previously entered ticket information can be edited (Pencil icon) or deleted (X icon).

For this Document you can:


Add Ticket

Back **Continue**

	Ticket No	Dep Date	Type	Cost	Depart	Arrive	CR	CL	Tax
See Itinerary 1		02/04/02	AIR	350.00					no



6. There are two icons in the left margin. The Update icon is used to view the data for the desired record. The Delete icon is used to delete the existing record.
7. Click on the Update icon to view the data for the desired record. The Update Ticket Information page is displayed. If the begin or end dates have been adjusted on the itinerary, align these dates for the transportation mode on this screen. The Cost Option box does not require adjustment. Verify that the payment method for the traveler's status is correct.


Update Ticket Information for 51-100 2-4 MSFC




Quick Tip
 To enter departure and arrival airports, click the Depart From and Arrive At lookup buttons.

Type
Ticket Value

Ticket No
Description

Dep Date 
Issue Date 

Carrier
Ticket Date 

Depart From 
Arrive At 


Contract Fare
Class

Contract Carrier
Confirmation No

Cost

Save Current Ticket
Close without Saving Updates

Cost Options
☒ **Reimbursable**
☐ **Taxable**
Expense Category COM CARRIER
Pmt Method
Vendor

8. Items to be reviewed for approval are transportation Type, Date, and the Cost fields. If modifications are made, click the Save Current Ticket button. If no modifications are made, click the Close without Saving Updates button.
9. Click the  button from the “For This Document You Can:” box. The Expense Entry page is displayed.
10. The expense screen is divided into two sections. The top half of the screen is used for the entry of more expenses. The bottom half of the screen lists all expenses on the document to be reviewed or approved.

Expense Entry for 51-100 2-4 MSFC

Quick Tip
 The Arrow icon indicates a required field. Click Save to save the current expense and refresh the screen so a new expense can be added.

Date 02/04/2002

(mm/dd/yyyy)

Expense Type

Expense Description

Miles Traveled

Rate Selection

Rate

Cost

Comments

For this Document you can:

- [Use Quick Expense](#)
- [Use Foreign Calculator](#)
- [Lookup Credit Card Expenses](#)

Save Current Expense

Done Entering Expenses

Back **Continue**

Copy Through Date

Cost Options

☐ Reimbursable

☐ Taxable

Expense

Current Expenses			
Action	Date	Expense	Amount
	02/04/2002	Rental Car	125.00
	02/04/2002	Taxi	12.00
	02/04/2002	Taxi	12.00
Total:			149.00


11. Click on the Update icon to view the data for the desired expense item. The Update Expense page will be displayed. If dates have been adjusted on the itinerary, be sure to review and approve dates for each expense. If changes are made, be sure to select the Save Current Expense button so the changes are saved to the document. To delete an expense from the document, click the Delete icon and the selected expense will be deleted and removed from the expense list.
12. When all expenses have been reviewed and/or modified, click the **Continue** button from the For This Document You Can: section.
13. Click on the Lodging/M&IE link from the Document Toolbar to review allowed lodging and M&IE costs as well as the per diem rates. The Lodging/M&IE page is displayed.

NOTE

The Reset icon resets the document Per Diem to its original state before any adjustments.

The **Replicate** icon duplicates lodging rates for each remaining night. Click the **Replicate** icon on the line of the rates to be copied.
















Lodging/M&IE for 51-100 2-4 MSFC


Quick Tip
 An asterisk (*) in the Special column indicates that a condition has been selected in the Advanced Lodging/M&IE window.


For this Document you can:

Reset All Lodging and M&IE expenses

Back **Continue**

Lodging/M&IE Data											
Date	Reset	Replicate	Ldg Cost	Ldg Allowed	M & IE Allowed	Per Diem Rate	Special	B	L	D	Conf %
 02/04/02			70.00	70.00	28.50	70 / 38					
 02/05/02			70.00	70.00	38.00	70 / 38					
 02/06/02			70.00	70.00	38.00	70 / 38					
 02/07/02			70.00	70.00	38.00	70 / 38					
 02/08/02			0.00	0.00	28.50	70 / 38					

14. If an (*) appears in the Special column, modifications have been made to the standard per diem Lodging and/or M&IE for that date. Click on the Update  icon to view the data for the date selected. The Update Lodging and M&IE page will be displayed.

Quick Tip
 For this lodging day, you can edit specific actuals, leave data, meals provided status, lodging amount, and if desired apply these changes forward using the apply through tool.

For this document you can

Next Expense

Save Expense Changes

Override Lodging and M&IE

Close Without Saving Changes

Lodging

Per Diem Rate: 70 / 38

Lodging: **Options**

Conference Allowance

☐ Conference Allowance **Conf Info**

Conference Rate:

Actuals

☐ Lodging
Limit: 0.00

☐ Meals
Breakfast: 0.00
Lunch: 0.00
Dinner: 0.00
Incidentals: 0.00


Leave Data

☒ None
☐ Annual
☐ Other
Hours: 0

Meals Provided

☐ Breakfast
☐ Lunch
☐ Dinner

Apply Through Date:




15. Review the information on this page. If changes are made, select the Save Expense Changes button to save document changes. Click the Close Without Saving Changes button if no changes are required. The Lodging and M&IE Summary page will be displayed. The Next Expense button displays the information for the Lodging and M&IE of the next day. The Override button is used for Limited Open Authorizations, when a traveler is staying on TDY over 30 days, or a traveler makes multiple trips to a location throughout the year.

For this document you can	
Next	Expense
Save	Expense Changes
Override	Lodging and M&IE
Close	Without Saving Changes

16. Click on the **Accounting Code** link on the Document Toolbar. The Accounting Codes page will be displayed. Review all accounting data to ensure proper funding.

Available Accounting Codes for 10-CFA08-01DC


Quick Tip		For this Document you can:	
	Once two or more accounting codes are selected, the Allocation button is enabled.	Change	to A Different Organization
Enter Search Criteria		Add	New Accounting Code
Accounting Code	<input type="text" value="D09010XX004S423"/>	Search	Retrieve
		Back	Continue
Master Accounting Codes		Click Accounting Label to add to Document	
Search Results		Prev 10 Next 10	
Organization	Label	Classification Code	

Accounting Codes for 10-CFA08-01DC				Click an item to edit/delete it
Organization	Label	Classification Code	Extended Code	
  10	D09010XX004S423	090-10-C1. SAT422003D. . . . FC100200. 2121. . .		Extended
 Edit	 Delete			

NOTE

The Travel Manager Account Code table will be populated with valid combinations of the Financial Classification Structure (FCS) elements, which are uniquely identified by the Account Code Label and the Organization.

- When multiple account codes exist on the document, click the Allocate button found on the bottom half of the screen. Review the top two lines on the screen to ensure the appropriate allocation has occurred.

**Quick Tip**
Expenses can be allocated by expense type, percent, date, expense category, or amount.

For this Document you can:
Close Allocation Screen

Accounting Allocation Summary						
Organization	Label	Amount	Percent	Date	Allocate By	Allocate By
22	D714050001S4202	476.50	<u>0</u>	<u>*</u>	Expense Category	Expense
22	R329960001H4202	400.00	<u>0</u>	<u>*</u>	Expense Category	Expense

Expense Category Allocation Breakdown for 'D714050001S4202'

Expense Category	Amount
COM.CARRIER	0.00
LODGING	327.00
M&IE	149.50
OTHER	0.00

Expense Category Allocation Breakdown for 'R329960001H4202'

Expense Category	Amount
COM.CARRIER	400.00
LODGING	0.00
M&IE	0.00
OTHER	0.00

Break by Expense Category

Expense Category	Allocate by Amount
COM.CARRIER	400.00
LODGING	327.00
M&IE	149.50
OTHER	0.00

- To exit the Allocation screen after reviewing, click the Close Allocation button. The Available Accounting Codes screen will be displayed.
- Verify that the Internal Order (FC100200) and the Object Class, for example 2121 for General Administrative Travel (Domestic), are listed as part of the Classification Code portion listed under the Accounting Codes for section. Example Classification Code: 090-10-C1. SAT422003D....**FC100200.2121**). These are required fields.

Available Accounting Codes for 10-CFA08-01DC

Quick Tip
Once two or more accounting codes are selected, the Allocation button is enabled.

Enter Search Criteria

Accounting Code:

Master Accounting Codes

Search Results [Prev 10](#) [Next 10](#)

Organization	Label	Classification Code

For this Document you can:

to A Different Organization

New Accounting Code

Click Accounting Label to add to Document

Accounting Codes for 10-CFA08-01DC				Click an item to edit/delete it
Organization	Label	Classification Code	Extended Code	
10	D09010XX004S423	090-10-C1. SAT422003D. . . . FC100200. 2121. . .		Extended
Edit Delete				

20. Click on the Continue button to review total charges, itemized detail of expense category charges, and any requested advance. The Totals page will be displayed.
21. Click on the Advance button to review the accounting data and justification for the advance if an advance has been requested.
22. Click on the Detail button to review details of all expense categories charged as well as any advance request as it applies to each category.
23. Click on the **Document Status** link from the Document Toolbar. The Status page is displayed again.

User:

Approver One

Traveler:

Student One

Authorization: 51-100 2-4 MSFC

- Document Summary
- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting Code
- Totals
- Comments

► **Document Status**

- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

Status for 51-100 2-4 MSFC**Quick Tip**

The Signature PIN is case sensitive!

For this Document

Stamp and Submit**Adjustments****Back** **Continue**Status to Apply ☐ Stamp Document Without Adjustment

Signature PIN

Remarks

Document Routing

This is the routing path the current document will take once routed

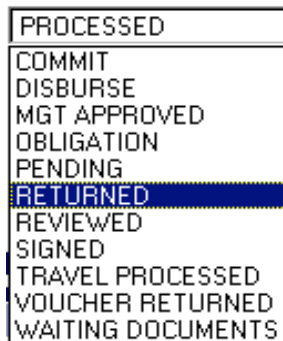
Name	Status	Level
Approver	MGT APPROVED	1
Approver One	MGT APPROVED	1
Reviewer One	REVIEWED	2
Reviewer Two	REVIEWED	3
Reviewer Three	REVIEWED	4
Reviewer Four	REVIEWED	4
Final Approver	APPROVED	6
TravelOffice Reviewer	CERTIFIED	7
CI Travel	CI TRAVEL	8

24. Enter remark(s) in the Remarks field if you have made adjustments or want to provide the preparer with instructions relevant to the return of the document. Remarks include the reason for the document return, or alerts to the next reviewer of specific modifications.

25. If the document is valid, enter your Signature PIN and click on the Stamp and Submit button in the For This Document You Can: section.

NOTE

RETURN A DOCUMENT: If the document is disapproved and/or needs adjustments, click on the Status to Apply box and select “RETURNED”. Enter your Signature PIN. Click on the Stamp and Submit button in the “For This Document You Can:” box. The document will be returned to the preparer.



NOTE

*If you must close out of the document before signing, click the **Document Summary** link from the Document Toolbar. Click the Undo Adjustment button from the For This Document You Can: section. Using this button logs the user out of a document and returns to the main screen. The document will remain in the **Review Documents** queue until it is signed and routed. To open the document again, click the Review Documents link and repeat the above steps to sign the authorization.*

26. After clicking on the Stamp button, the Pre-Audit Results page is displayed. Review the Pre-Audits. Pre-Audits give the user an indication of what is in the document. If any audit fails, the word FAIL will be in the Status column. A comment describing the failure will appear in the Comments column. A FAIL is noted only to draw attention to a particular area of the document. A PASS is an unrelated document item. Click the Close button to exit the Pre-Audit page. (For a description of Pre-Audits, refer to the Appendix).

NOTE

*If changes are necessary to the document after reviewing the Pre-Audits, click on the **Cancel** button. The document will not be signed and will not route. The document can be modified without adjustment at this time.*

27. Click the **Continue** button from the “*For This Document You Can:*” box. The document is complete and routed to the next person in the routing list.
28. If more documents reside in the “queue” for the user, click the **Review Documents** link from the Document Toolbar and repeat the above steps.